

## Treasurer Compliance Audit - Final RFP Evaluation Recap Form

	Maximum Points	County Of Orange Internal Audit	Link, Murrel & Company	Macias Gini & Company	Moreland & Associates
<b>COMPANY EXPERIENCE/QUALIFICATIONS:</b>					
Past experience and performance on comparable governmental audits	75	66	38	55	50
The quality and experience of the professional staff to be assigned to this engagement, the quality of personnel to be available for technical support, and the adequacy of the staffing plan.	100	86	53	78	93
<b>Total Experience/Qualifications</b>	<b>175</b>	<b>152</b>	<b>91</b>	<b>133</b>	<b>143</b>

<b>UNDERSTANDING THE SCOPE OF WORK AND AUDIT APPROACH:</b>					
<b>Project Overview and Approach:</b>					
Offeror exhibits a clear understanding of the <b>Scope of Work</b> as included in their required <i>Narrative Overview and Technical Approach/Understanding the Requirements</i> (see page 9, Section II Requirement 13)	25	23	19	12	22
Offeror's Technical Approach for their <i>Required Audit Proposal</i> and <i>Required Agreed-Upon</i>	50	47	35	26	44
Offeror's Technical Approach for their <i>Optional Alternate Audit Proposal</i> and <i>Optional Alternate Agreed-Upon Procedures Engagement Proposal</i> meets or exceeds the minimum requirements as set forth in Exhibit A - Sections II A and B. <i>Scope of Work - Engagement Minimum Requirements - Required Audit Proposal</i> and <i>Required Agreed-Upon Procedures Engagement Proposal</i> .	40	0	0	0	0
<b>Factors to evaluate in reviewing the merits of the Offeror's Technical Approach:</b>					
Sample sizes and extent to which statistical sampling will be used in the engagement	10	9	8	7	10
Extent of use of EDP software in this engagement	10	5	4	4	4
Approach to be taken to gain an understanding of the Treasurer's internal control structure as described in Contractors Duties and Responsibilities (Exhibit A - Section III B)	10	10	7	5	10
Approach to be taken in determining laws and regulations that will be subject to audit test work as set forth in Contractors Duties and Responsibilities (Exhibit A - Section III, D and E)	10	10	6	4	10
Approach to be taken in drawing audit samples for purposes of tests of compliance.	10	9	8	5	9
Compliance with Required Delivery Dates or reasonable modification.	10	10	10	10	8
<b>Total Audit Approach</b>	<b>175</b>	<b>123</b>	<b>97</b>	<b>73</b>	<b>117</b>

<b>COMPLIANCE WITH RFP REQUIREMENTS:</b>					
Meets requirements with Requirements Section II, 1-15	10	10	10	8	10
No exceptions or minimum number of exceptions to Terms and Conditions of the Agreement	15	14	15	15	14
<b>Total Compliance Requirements</b>	<b>25</b>	<b>24</b>	<b>25</b>	<b>23</b>	<b>24</b>

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<b>PROPOSED COST:</b>					
Firms will be awarded points for all-inclusive price, based on the following formula:	0- 25				
<u>Lowest Bid Price</u> X Maximum points = Price Score					
Individual Firm's Bid Price					
Proposed Standard Audit Costs		288,900.00	184,500.00	129,859.00	184,000.00
	75	34	53	75	53
Proposed Agreed Upon Procedures Cost		140,580.00	59,000.00	336,474.00	156,000.00
	50	21	50	9	19
Total Proposed Costs		429,480.00	243,500.00	466,333.00	340,000.00
Total Points	125	55	103	84	72
Total Score	500	354	316	313	356